MANAGER ACTION GUIDE

ENGAGEMENT

People element

Your engagement survey results are in, now what?

The most important step in the survey process is to take time to understand your employees' thoughts and experiences and use those insights to help make work better. Here are 5 simple steps to help you get started.

This guide is intended for department managers and team leaders.

Step 1: Take time to listen and learn

Listen and be aware of what people are experiencing.

Be open.
Be open to what the data is telling you and be aware of potential bias. While perceptions do not equal reality, they are the reality of the person giving feedback. This is an opportunity to empathize and understand different points of view rather than dismiss them.

Avoid pitfalls.
Look for patterns and trends in feedback. Critical comments can stand out and therefore rent more space in your head than they're worth. And sometimes the lowest scoring item isn't necessarily the one that should be acted on.

Thank people.
People took time to share their feedback and it's important to take a moment to show gratitude and appreciation. Thank them and explain that you'll review the feedback and create a plan of action to share with them.

Step 2: Understand your results

Review your team's report and highlight areas that stand out.

Did enough people respond?

Check your team's **Participation** to understand how many people gave feedback. This provides context to your results, and you can determine how representative the feedback is. Lower participation should not stop you from acting but you may find you need more information and need to meet with your team to gather their direct feedback.

What's the overall sentiment of your team?

Overall Favorability shows the sentiment broken down by percentage of people feeling positive, neutral, or negative. **Favorability by Category** shows how people rated their experiences favorably across the different survey topics. *Note*: *Favorability is the percentage of people who respond favorably with a 4 or 5 on a 1-5 scale.*

What are your top opportunity areas?

Suggested Areas of Action provide the top 3 impact items based on your team's survey results. These items are generated based on an algorithm of various report components to identify areas that if acted on, can improve employee experiences.

Top Drivers of Engagement (may display instead of Suggested Areas of Action) are the specific drivers of engagement based on the organization's overall survey results; not specific to your team results. This advanced analysis known as a key driver analysis identifies the questions that if acted on, are more likely to improve organization-wide engagement levels.

How engaged is your team?

The **Engaged Employees** gauge shows the percentage of people engaged from 0% to 100%. If you've participated in an engagement survey previously, a comparison shows how much engagement has changed.

What are the highest and lowest rated items?

Your **Dashboard** lists your five highest and lowest rated items based on favorability. Note your strengths and opportunities but understand that the lowest rated item isn't always the most important to act on.

What about comments?

While **Comments** can provide further insight into specific issues, it's best to review them after your quantitative results. Check to see if they provide additional information to help you understand low scores or give insight into something new. While comments can provide context to scores, they can sometimes be distracting if you focus on the most critical comment instead of themes across your report. *Note: comments may not be available based on your specific level of access.*

For more information on how to interpret additional report results, go to Understanding Results.

Step 3: Narrow your focus

Identify things going well and opportunities for improvement.

Resist the urge to focus on one piece of feedback that could be based on a single incident, look for themes and patterns throughout the report.

- **STRENGTHS**: Note 1-2 things going well and recognize these with your group. You can find these by reviewing highest rated items and favorable comments.

- **OPPORTUNITIES**: Note key data points from Suggested Areas of Action, lowest rated items, and unfavorable comment themes (if available).

- **ASK YOURSELF THESE QUESTIONS:**
    - Do you see a common theme in people's feedback?
    - Is there "low hanging fruit" or a quick win? There may be opportunities you can easily act on to show people their feedback is quickly being put to good use.
    - What is within your control to act on? Keep in mind some opportunities may seem out of your control such as compensation and professional development. However, there are usually some items you can impact.

Decide what to focus on.

Select at least one focus area to start. We recommend keeping the number of action areas limited to one or two to ensure you have the bandwidth to follow through and make meaningful changes. Consider what will have the biggest impact on your group as well as the company.

Step 4: Share results

It’s time to take what you learned and share with your group.

Share results and gather feedback.

Set up time with your group to review results. We recommend sharing the high-level results you noted above to keep the discussion focused on strengths and opportunities. Show vulnerability by noting areas that may have surprised you as this might help others feel open to sharing their thoughts.

Ask questions to engage your team.

- Are results what you expected?
- Any surprises?

Next, share the area(s) of focus you identified in Step 3 with next steps for action planning. This may be a good chance to gather more feedback if needed. Encourage people to share their thoughts and ensure people feel safe to express themselves. Don’t dismiss any of the feedback or make your own judgment of the results.

PRO TIP: Depending on your size and structure, consider reviewing report results directly from the People Element platform or share your PDF dashboard report.

Step 5: Take action

You don’t need a corporate-wide initiative to create meaningful impact with your team.

Create your action steps.

Once opportunity areas have been discussed, determine what specific actions you and your team can take to improve. It may be obvious what the next action is for your focus area but sometimes, it can be difficult. Leverage resources around you to help identify the right next steps.

Here are a few things to consider:

- Gather ideas from your team. They have a unique insight into what may work or not work and can help generate possible solutions.
- Talk to other leaders and managers you work with. Your peers can share ideas and what they’re doing to help you think differently about your approach.
- Reach out to your HR team for support. They may have ideas and resources readily available that can guide you.
- Use the People Element Platform action planning tools to help. Go to the Action tab and click on the corresponding action items to get best practice recommendations.

Act.

Now that you know what you want to work on, note the specific action items you’re going to take and put deadlines to them. Use the Action Plan Worksheet on the last page to help you get started. This is the time to follow through on what you said you would do.

Best practices for continuous improvement

Communicate

Communicate the specific actions you're taking as a direct result of your people's feedback. Why? Because we care about you and want to improve the things we can to make this a better place to work.

Be accountable to your plan

To ensure changes are made and not just talked about, set specific goals and a time for completing them. These don't need to be set in stone but put a stake in the ground for where to start and keep things moving.

Get feedback on progress

Check in with your team regularly on how things are going. Share with others what you're doing and see if they have ideas for what to consider starting, stopping, and continuing to do.

Keep listening, learning, and responding

You ask, you listen, you respond, and you connect with people to open the lines of communication. What your employees are experiencing today may very well change in six months or less. Be intentional about your listening strategy so you can adjust and evolve with your people in real time.

Action Plan Worksheet

One of the biggest indicators of a successful action plan or goal is to write it down. Keep it simple and don't overwhelm yourself with a long list of things to do. The actions set out in your plan should be SMART:

S	M	A	R	T
Specific	**Measureable**	**Achievable**	**Relevant**	**Timely**

Keep your plan focused and intentional to set yourself up for success. Choose only one or two things to work on and break down your goals into manageable action items.

- List up to 3 main findings from your feedback for greatest strengths and areas to improve.
- Build your action plan by choosing what you're specifically going to do based on your survey results and how you're going to do it. List these as your Action Items.

Reflection and Feedback Summary

Strengths	Opportunity Areas
•	•
•	•
•	•

Plan of Action

Area of focus	Action Items	Due Date	Notes